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P01/7700 0.00-0324346.6

Request for grant of a patent

(See the notes on the back of this form. You can also get an explanatory leaflet from the Patent Office to help you fill in this form)

The Patent Office

Cardiff Road
Newport
South Wales
NP10 8QQ

1. Your reference — P04112GB

2. Patent application number *(The Patent Office will fill this part in)* — 0324346.6 — 17 OCT 2003

3. Full name, address and postcode of the or of each applicant *(underline all surnames)*

SHOWBUSINESS SOFTWARE LTD
137 Euston Road
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England

Patents ADP number *(if you know it)* 8658213001

If the applicant is a corporate body, give the country/state of its incorporation — GB

4. Title of the invention

SYSTEM FOR FACILITATING MANAGEMENT AND ORGANISATIONAL DEVELOPMENT PROCESSES

5. Name of your agent *(if you have one)*

"Address for service" in the United Kingdom to which all correspondence should be sent *(including the postcode)*

LAURENCE SHAW & ASSOCIATES
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Birmingham B16 8TG

Patents ADP number *(if you know it)* 13623001

6. Priority: Complete this section if you are declaring priority from one or more earlier patent applications, filed in the last 12 months.

Country	Priority application number *(if you know it)*	Date of filing *(day / month / year)*

7. Divisionals, etc: Complete this section only if this application is a divisional application or resulted from an entitlement dispute *(see note f)*

Number of earlier UK application	Date of filing *(day / month / year)*

8. Is a Patents Form 7/77 (Statement of inventorship and of right to grant of a patent) required in support of this request? — Yes

Answer YES if:

a) any applicant named in part 3 is not an inventor, or
b) there is an inventor who is not named as an applicant, or
c) any named applicant is a corporate body.

Otherwise answer NO (See note d)

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Patents Form 1/77

9. Accompanying documents: A patent application must include a description of the invention. Not counting duplicates, please enter the number of pages of each item accompanying this form:

Continuation sheets of this form	
Description	22
Claim(s)	0
Abstract	0
Drawing(s)	11

10. If you are also filing any of the following, state how many against each item.

Priority documents	
Translations of priority documents	
Statement of inventorship and right to grant of a patent (Patents Form 7/77)	
Request for a preliminary examination and search (Patents Form 9/77)	
Request for a substantive examination (Patents Form 10/77)	
Any other documents (please specify)	

11. I/We request the grant of a patent on the basis of this application.

Signature(s) LAURENCE SHAW & ASSOCIATES Date 19/10/03

12. Name, daytime telephone number and e-mail address, if any, of person to contact in the United Kingdom

Edward C Dowler 0121 454 4962

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Notes

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b) Write your answers in capital letters using black ink or you may type them.

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DUPLICATE

Agents ref: P04112GB

SYSTEM FOR FACILITATING MANAGEMENT AND ORGANISATIONAL DEVELOPMENT PROCESSES

This invention relates to a system for facilitating management and organisational development and in particular for supporting the processes of expertise capture, management, transformation and capacity building. An object is to provide a system aimed at the translation of intention into actions for organisations of any scale even spanning boundaries of ownership, management and location.

Transformation (significant structural and process change) is a pressing requirement for governments (to support Service Delivery) and corporations to support strategic change and good corporate governance. It is becoming widely accepted that the challenge for CEOs, Executives and Managers in public and private sectors is not so much to create good strategy and policy, but to effectively implement policy and strategy. An individual can manage a project or program with a to-do-list linked to certain project objectives. For an organisation of many people, the complexity of managing objectives and actions limits the ability to maintain effective alignment, coordination and delivery. Potential economies of scale are lost to inefficiencies of inconsistent objectives and uncoordinated actions.

Even small organisations are often ineffective and inefficient because different people in different parts of the organisation are working in different directions which at worst cancel out or at best do not support one another optimally.

Organisations and networks of organisations often make the same mistakes repeatedly because they fail to learn from experience.

A person in a role or function gains important knowledge and experience. When they move on or are replaced, their knowledge goes with them.

Search engines and knowledge discovery tools help users to find information they need from a mass of available information created for many different purposes. However, the amount of information that becomes available can become excessive, particularly when there is no effective filing system.

Also, when a process such as a complex change program is being contemplated, it may become clear at the outset that the management capacity available, i.e. the management experience, competence and skills needed, is insufficient. Lack of management capacity is a major limitation to large change programs, including, for example, the implementation of e-government.

An object of the invention, when realised as a software program and supported by an appropriate management process, is to provide a way of defining implementable strategy and policy together with an effective implementation strategy and policy together with an effective implementation and delivery engine for an organisation of any scale. Another object to assist in aligning actions across an organisation or network of organisations with a consistent set of objectives.

Further objects of the current invention is to provide a means for systematically harvesting learning from experience and making it available for re-use by others across an organisation or network of organisations, and for systematically capturing the history and experience of personnel so that their role or function is available to a future replacement. Learning is then effectively harvested by use of the system.

Yet further objects are to provide a significant improvement in the overall process of knowledge creation, capture, discovery and re-use. This is done by capturing knowledge linked to the strategy or objectives of an organisation. In this invention it is ensured that knowledge is metatagged and 'filed' against the objective(s) which it supports as it is created. As a result, it can be rapidly retrieved to support a user in meeting a specific objective.

Finally, especially when lack of management capacity is a problem, the invention aims to increase or build that capacity by enabling an organisation to re-use its experience, competence and skills using tools such as the capture of roadmaps, checklists and processes as re-useable scorecards to support on-the-job learning.

According to the invention, there is provided a computer, software, method and/or computer screen display comprising any one or more or any combination of the features defined in the respective paragraphs numbered 1 to 24 hereinbelow.

Throughout this specification, the words "comprise", "comprises" and "comprising" means "include", "includes" and "including" as the case may be, and also "consist of" consists of" and "consisting of" as appropriate.

The following abbreviations are used herein:

Objective, Critical Success Factor (CSF) (means same as Key Result Area, or Key Performance Area), Key Performance Indicator (KPI);

Perspective, Critical Success Factor, Key Performance Indicator

Key Transformation Indicator (KTI);

Key Survey Indicator (KSI).

Herein, where we associate knowledge, security or other attributes to a KPI, KSI or KTI, we assume it can also be associated with an Objective, Perspective, CSF.
The generic term used for KPI/KSI/KTI is Measure.

For a better understanding of the invention and to show how the same may be carried into effect, reference will now be made, by way of example, to the accompanying drawings in which Figures 1 to 6 are respective screenshots generated during operation of the system.

In the invention, an important feature is the handling and on-screen presentation of certain Key Performance Indicators (KPIs) and Key Transformation Indicators (KTIs).

1. KPIs can be entered manually or automatically computed from a computer system or sensor. Use of KPIs is standard approach to management. In this invention, the combination of KPIs is derived from a workflow system with the performance management and knowledge management features below.

2. KPIs can be automatically computed from a workflow system, which itself routes and manages documents, each of which represents, for example, an insurance claim, or complaint. Computation of KPIs from workflow systems is a common feature of workflow systems. Combination of KPIs derived from a workflow system with the performance management and knowledge management features below is novel.

3. It is known practice to define KPIs in terms of levels of maturity with colour, pattern, visual, auditory or other sensory codes (in the case of colour coding, these are commonly known as traffic-lights) associated with each. (Examples

include rating of level (RED=Low, YELLOW=Medium, GREEN=High, BLUE=Very High) or ratings of projects, change, or achievement, for example (RED=No Plan, ORANGE=Plan, YELLOW=Plan Not On Track, GREEN=Plan On Track, Blue=Plan Done). For clarity, such measures are referred to here as Key Transformation Indicators (KTI). See Figure 1.

(Other products do measures, but do not deal with definition and rating against KTIs.)

4. As a further enhancement of this approach of colour coding the level of a KTI in a linear or one dimensional sequence, (or 2 or n-dimensional arrays of possible values can be stored in a database, spreadsheet or multidimensional database) and can be colour coded based on the current state of each KTI.

5. The states of such KTIs may be combined with other performance measures (for example sales values etc) and presented in a 2 dimensional array or Scorecard to show, for example, progress over time, where, for example, the rows of the array relate to different KTIs and the columns of the array relate to different time periods or to allow comparison, where the columns might, for example refer to different organisations, locations, budget vs actual, etc.

6. A value (word, or number, or symbol) denoting the KTI value can be included in the presentation of each cell in this display. See Figure 2.

(Other products do numbers and symbols, but not text. A previously proposed system does rating against levels, but only if those levels are defined numbers. As shown on Figure 3, in the present invention a word and checklist can be associated with each level for a defined KTI. The resulting colour coding and

word is automatically displayed in the scorecard, rather than having to be manually set in separate traffic light formula for each KTI).

7. KTIs can be traffic lighted based on absolute value, or the difference between a target or forecast and actual value.

8. The current invention provides means – by mouse or keyboard or other input device or by programmatic calculation - to set the colour level of a KPI and record the resulting colour coding together with an indication of the level or value of the KTI.

   a) Manual means – by selecting from a options or a picklist of possible values, each of which is associated with a KTI value. See Figure 4.

   b) Manual means – by allowing a user to answer a checklist and computing the KTI value, based on these values.

   c) Programmatic means – by computing the value for a KTI, based on computer data or input, for example, from the status of a customer account approval process in a financial accounting system or a project management system.

   (The general idea of Analysis, Actions, Learnings is present in our current project, but not associated with KTIs which have textual values automatically fed into a scorecard.)

9. The current invention provides a means for capturing a project plan or strategy in an electronic form, including defining and rating of progress against KTIs and KPIs. With KTIs text values may be automatically rated with words.)

10. Progress of project plans captured in this way can be assessed manually or programmatically to generate a scorecard showing status of a project. Repeated assessment can automatically generate a scorecard showing trend in progress over time. See Figure 6.

11. The current invention allows a super-user or computer program to define templates which can in turn be used to capture plans in a standardised format, thereby capturing expertise in roadmaps for transformation, policy implementation, strategy execution etc.

    a) These templates allow combination of textual descriptions, questions and text capture fields with pre-defined sequences of KPIs, KSIs, KTIs, Objectives, CSFs, Perspectives. As a result Templates provide a means for capturing expertise and making it available for use by others.

    b) KTIs can be used once, for example to assess overall project progress, or repeatedly for example to assess the maturity of a number of processes or client relationships.

12. Surveys (surveys may be included in plan templates). Generation of surveys from templates covering only the survey is one thing but this is improved in the invention by associating analysis, actions, learnings with survey results.

    a) Templates can include defined surveys to be used by all plans derived using the given template.

    b) Plans can define surveys to be performed repeatedly.

    c) Surveys consist of a number of questions.

    d) Results are aggregated after each survey is taken and the results are traffic lighted into survey-derived KPIs, denoted KSIs (Key Survey Indicators) which can be displayed in a scorecard alongside KPIs and KTIs.

13. The current invention provides means for associating Analysis (descriptive text) with a KTI, KSI or KPI in a period, region, organisation, etc.

14. The current invention provides means for associating Action Plans, milestones and associated workflow (steps towards completion of actions) with a KTI, KSI or KPI in a period, region, organisation, etc.

15. The current invention provides means for recording Lessons Learned with Action Plans, milestones and associated with a KTI, KSI or KPI in a period, region, organisation, etc.

16. Properties of Analysis, Actions, Learnings, discussions

    a) Each Analysis, Action, Learning can be associated with an organisation, region, mode (budget/actual), etc.

    b) Analysis, Actions and Learnings can be linked together.

    c) Each Analysis, Action, Learning can have a named owner.

    d) Sub-tasks or milestones can also have named owners.

    e) Analysis, Actions and Learnings can be associated with an individual KTI or KPI, or with a scorecard reflecting a collection of KTIs, KSIs and KPIs.

    f) Discussions can be associated with particular KPIs, KSIs and KTIs.

17. Reports can be generated to include KPIs (numeric values), KTIs (including textual rating values), KSIs (Survey results), Traffic Lights, Analysis, Actions. In particular, an Executive Summary Report, generated automatically summarises an entire scorecard.

18. Security

a) Each Scorecard and KPI, KSI or KTI has an owner. In addition users or groups of users can be defined by the scorecard owner as readers and authors for KPI, KSI or KTI data and for Analysis, Actions and Learnings.

b) By default all Scorecards, KPIs, KSIs, KTIs, Analysis, Actions, Learnings can be made available to all users or to no users.

c) Scorecard owners may permit the groups of users associated with other scorecards to view their scorecards. This facilitates Peer to Peer usage.

d) Scorecard templates can be defined by a named group of users.

e) Scorecard templates may be used to complete plans by a further named group of users.

19. Reusability and DNA

a) KPIs, KSI and KTIs are saved in a library for re-use within template definitions and plan definitions. (DNA)

b) Sequences of KPIs, KSIs, and KTIs can also be grouped and saved for re-use, including grouped under an Objective, CSF or Perspective. (DNA strands.)

c) It is possible to inherit the properties of one template for re-use in another.

d) It is possible to lock a template, so that it can be used repeatedly and consistently.

e) It is possible to lock a plan so that it cannot be changed, but can only be rated (to update a scorecard) after approval.

f) It is possible to combine KPIs, KSIs and KTIs (also Objectives, Perspectives, CSFs) from two or more scorecards to create a hybrid scorecard.

g) It is possible to browse and search for scorecards to support a particular purpose.

20. Knowledge Management

a) Analysis, Actions, Learnings are here referred to as knowledge.

b) Knowledge can be accessed by clicking on a particular scorecard, KPI, KSI, KTI, etc.

c) Knowledge is accessible subject to security rights of the user.

d) Knowledge relating to one or many organisations can be accessed via a portal ordered by:

i) Person

ii) Personal content – generated by me or for me (eg all my actions, all my learnings, etc.) (This has been disclosed for KPIs, but not for KSIs or KTIs.

iii) Organisation

iv) KPI/KSI/KTI – this is an important innovation. It means that there is no need for a search engine. The system has used the inherent metatags of the template/plan/scorecard/measure to link related knowledge.

v) Other user defined attributes associated with person, organisation, KPI/KSI/KTI.

21. Management of Values

22. Expertise Location

    a) By categorising people by Objective/CSF/Measure and Perspective/CSF/Measure, the system allows users to locate people with expertise and knowledge in a particular area.

23. Collaboration: Wherever there is a named owner, for example on Template, Plan, Scorecard, CSF, KPI/KSI/KTI, a user can click on the name to:

    a) Instant Message that user.

    b) Email that user.

    c) Start a discussion thread with that user.

24. Languages

    a) The current invention allows users to swap between user interface language while maintaining the same visual display of, for example scorecard.

    b) Also to show an automatically translated version of the system content in a chosen language.

KTI Definition user interface

KTIs are defined as a sequence of colour-coded steps or levels.

Each step may have an optional short text string to describe it.

Each step may have an optional textual description and/or checklist defined.

The level of the KTI value may be set manually based on a user's judgement or automatically based on

Business Issue: Managing Process

Implementation of process automation software including, for example Enterprise Resource Planning systems like SAP, creates automation which can potentially hide the details of business operations, including inefficiencies which would be obvious to an experienced manager and governance issues which would be obvious to an experienced auditor.

A further innovation allows the current invention to be applied to ERP and workflow software.

KTIs are manually or automatically generated to show the degree of implementation of standard processes.

KPIs are automatically generated to show the level of outcomes being produced, for example, average end-to-end speed of delivery, average time in a particular process step, number of items in a particular stage of a workflow.

KSIs which are used to measure the opinions of stakeholders in the process can also be recorded.

By combining the KTIs and KPIs (and optionally KSIs) for a process or series of processes within a scorecard, a manager can rapidly understand the status of that process for management purposes. A scorecard of this kind effectively embeds process management expertise - see Figure 6.

Process definitions can be recorded in standard formats, allowing the same process to be supported by different technology solutions.

By storing the definition of a process scorecard with the definition of a process, management expertise related to a process can be implemented alongside the process.

Putting in Place a Process within an organisation

1. Deployment of Policy and Process guidelines and standards as scorecards which define Process (KTIs: Step-by-step and maturity models), together with outcomes (KPIs and KSIs).

   An expert in business processes and change management can, based on their expertise, define a sequence of steps recommended in order to get a new organisational process up-and-running within an organisation.

   By translating this sequence of steps (and hence the expertise) into a series of KTIs, an expert can provide others with the ability to use their expertise in getting organisational processes up-and-running.

   Business Issue: Organisational Complexity

   Large organisations can be too complex to conceptualise and hence it is difficult to create strategy for them and to manage them. The current invention has a number of innovations which support management of complex organisations. One result of these innovations is that the aggregate intelligence of all of the people in the organisation is more effectively liberated. The whole system can 'think' and innovate to emerge strategy and manage, rather than waiting for top management or a strategy department to arrive at answers.

2. Sharing of a distributed library of performance and/or "Transformation Knowledge" including KPIs, KSIs and KTIs which themselves are used in creating Templates and Scorecard, as well as Analysis, Actions and Learnings enables sharing of business ideas across an organisation.

3. Peer-to-peer sharing of KPIs, KSIs, KTIs, Templates and Scorecards, as well as Analysis, Actions and Learnings allows for ad-hoc linkages to be created which

cut across organisational and departmental boundaries (allowing people to learn from one another).

4. Distributed security supports this. Securing of all aspects of this Transformation Knowledge, according to, for example, name, role, organisation, department, etc, allows these networks to spread more organically Better security allows for spread of networks because it reduces the fear of information falling into the wrong hands. When it is easier to share the information with intended recipients, without risking sharing with non-intended recipients, people are not afraid to share what they know.

Distributed Security – Different people in different places can set security for their scorecards (including KPIs, KTIs, KSIs and other objects independently).

This allows peer-to-peer sharing.

Topology 1: Peer to Peer

Every user can share their scorecard with any other user directly over the Internet or a network. A user can notify a user of their desire to share content by email, or by electronic request input to a web page.

Several scenarios for requesting and granting sharing of scorecard content, including:

- Owner sends email to subscriber offering to share. Subscriber accepts. Owner's content becomes available to subscriber alongside any other scorecard information available to subscriber.
- Subscriber requests and owner accepts.
- Sharing may be reciprocal (each shares scorecard content with other) or one way.

- Sharing may be full or partial.
- Degree of sharing and information shared may be role or function or interest based or manually set.

Scenarios for Owner and subscriber meeting

Owner and/or subscriber publish a profile which may, for example include keywords, KPI names, KTI names, KSI names and or content. Electronic search locates possible matched interest and introduces two parties.

Topology 2: Peer-to-peer hub

A hub provides a central registry for scorecards, KPIs, KTIs, KSIs.

Users subscribe to the hub by stating their areas of interest.

Relevant partners for sharing scorecard content are made available based on matching profiles.

For example a global or company-wide sharing network, with users sharing via a central hub.

Topology 3: Networked Peer-to-peer - see Figure 8

For example, a network of organisations, with a separate hub for users within each organisation.

This allows for secure sharing of expertise and knowledge within the organisations hub and more restrictive sharing between the organisation's hub and other organisations hubs.

Scorecard sharing and the global on-line expertise library.

Expertise can be encoded and saved for re-use as KPIs, KTIs, KSIs and sequences and hierarchies of these.

The current invention allows for these sequences and hierarchies to be combined together.

In this way, the current invention allows expertise created by different people to be added together for reuse.

By providing access (via keyword search, profiled search, or point-and-click navigation) to re-useable expertise, from multiple sources, the current invention allows for creation and use of compound, additive expertise.

Issue: Speed of change, complexity of information, too much to learn

Change is commonly described as accelerating. For example, in a corporate context, globalisation means that every organisation in a market may be competing with many other organisations around the world, each of which is innovating. The result is that people and organisations find it hard to keep up. There is a gap between how fast we can learn and what we need to know.

Solution: Expertise on-demand. The current invention facilitates codifying knowledge as ordered lists or hierarchies of KPIs which define WHAT the desired outcome is, KTIs which define among other things HOW the desired outcome will be produced and KSIs which define how the perception of stakeholders will change before, during and after the desired outcome.

By allowing saving and loading of hierarchies, for example of Objectives, Critical Success Factors and KTIs, KPIs, KSIs, the current invention allows knowledge expertise to be saved and retrieved. This is different from Scorecard Templates in other software packages, since KTIs and KSIs define knowledge and expertise beyond the simple definitions of KPIs.

In the same way as a CD writer codifies data for later retrieval, the current invention codifies expertise for later retrieval.

In the same way that the CD player has no inherent understanding of the music being played, the person or system retrieving expertise stored as KTIs, KPIs and KSIs need have no prior knowledge of the expertise being retrieved. The KTIs describe WHAT to achieve, the KPIs define, among other things, HOW to achieve it and the KSIs define the surveys required and measures of opinion to be monitored and managed in retrieving the expertise.

Note that KPI, KTI and KSI definitions may have related education materials including text, multimedia documents, web links. The hierarchy KPIs, KTIs, KSIs are providing a structure to which elements of relevant knowledge can be attached.

Alternate and complimentary Knowledge Sets.

The Knowledge attached to KTIs and KTI steps in particular may be textual, pictorial, audible, etc.

Knowledge Sets for different user types, experience, learning style etc.

There may be alternate sets of knowledge attached to each step, suitable for different levels of education and styles of learning.

Manual selection between different Knowledge Sets.

Users can switch between these alternative types of knowledge manually.

Automated selection of Knowledge Set based on user profile.

In addition, the System may store a profile of the user and present the appropriate style of knowledge presentation and depth of content.

User profile based on history, interest, experience, manual profile.

The system may generate a user profile through a combination of:

Tracking previous user actions, choices, searches, emails, communications etc, as well as from profiles held in other systems or input into the system.

Profiling according to learning style.

In particular, the system may profile the user according to learning style:

Visual, Auditory, Kinaesthetic, Factual.

Issue: Expertise communities

The current invention allows expertise in the form of any combination of KPIs, KTIs, KSIs and related information to be stored and retrieved to provide expertise on-demand.

Issue: Explosion of knowledge

Solution: Purposeful knowledge management – store all knowledge against an intent

Resources: Definitions, Knowledge Discovery Results, Web/Intranet links, on-line training courses, calendar of related events, contact details of related people...

RESOURCE= Definition, Knowledge, Links, Courseware, Timetable, People,...

When resources are stored according to purpose (using the Objective/CSF/Measure hierarchy), they can be retrieved simply and purposefully.

Issue: Speed of learning insufficient to keep up with need for new learning

The speed at which people and organisations need to learn exceeds the ability of traditional means to collect knowledge and deploy it for re-use.

Solution: Purposeful learning

By linking training and learning resources to the Intent Hierarchy: Objective/Cricitcal Success Factor/KPI or KTI or KSI and further to levels of performance

Eg

KPI Red – applicable education resources

KPI Green – applicable education resources

- given this level of achievement, here is courseware showing what you might do to maintain the position.
- Here is a network of people who will be of interest.

KTI Red Step – applicable education resources

KSI Red – applicable knowledge – e.g. if morale of staff is low, here is a course on how to improve staff morale.

User Interface to support this?

As for Step by Step measures, but with Resources alongside each step.

As for All-My-Actions, but showing other resources.

As for standard ADBS – (Scorecard, Analysis, Actions) – but with ability to Interchange Actions or Analysis with, for example, a list of related people, related courseware. Also ability to show one or more Resources concurrently.

ALTERNATE ACCESS TO RELATED KNOWLEDGE

Scorecard with list of resources below left (for Scorecard or individual measure), e.g. People, Courseware, Links

Click on name of resource, e.g. People, to see a list of people on the right.

OR

List of resources available, distinguished by different icon for different kinds of resources, e.g. people, links, courses...

Intelligent Clustering.

The simplest Purposeful Clustering, is to place organisations which share Objectives/CSFs/KPIs adjacent for comparison purposes in the system.

While each of the following Inventions refers to organisations. The same innovations apply to the case where the organisation is a Business/Department/Team, etc and where it is a person/individual/employee/team member.

A further innovation is to place organisations adjacent according to the degree to which they share measures. The simplest example is to group according to the number of shared measures.

When an organisation is selected, comparison organisations are ranked according to the number of shared measures.

A further innovation is to rank according to the number of measures shared after weighting measures according to their importance to the organisation using the system. In this way, one, important shared measure could override the effects of several less important measures.

A further innovation is to further rank organisations according to the level of KPIs they have achieved, the degree of progress they have made with KTIs, the climate of opinion in which they operate or their organisational culture as KSIs.

Means of conditionally sharing information (KPI, KTI, KSI definitions, values, analysis, actions, learnings, people, courseware, links, knowledge, etc) according to the KPI, KTI, KSI definitions, values, analysis, actions, learnings, peole, courseware, links, knowledge, etc of the other organisation. (In effect the system is enabling a user to give effect to the statement: If you are like me in this respect then I want to share this with you.)

Means of searching organisations according to KPI, KTI, KSI definitions and levels of achievement and alerting a user to potential benchmark and partner organisations, based on these values.

An agent to provide the above function on request, in effect answering the question: "Which organisations should I know about based on common purpose or common challenges?"
"Which people should I know about, based on accountability for similar organisations."
An agent to automatically provide the above function.

The ability in the system to maintain benchmark organisations (with similar KPIs, KTIs, and KSIs at similar levels of achievement)

Intelligent Clustering with people
As stated above, the same clustering applies to people.

Where a job function is expressed or could be expressed as a number of objectives, measureable as KPIs, KTIs and KSIs.

The same clustering and conditional sharing can be applied to people.

ECD/JW/P04112GB
October 17, 2003

ADBS Step by Step functionality

Define the traffic light colours to be used in the scorecard settings:

▼ 8. Step-by-step Traffic Lights:

Step	Color	Symbol
1	dark red	
2	red	↓
3	orange	↘
4	yellow	→
5	green	↗
6	blue	↑
7	white	
8	white	
9	white	
10	white	

Fig. 1

Configure the KPI document to use Step by Step traffic lights

KPI information	
KPI	HR Roadmap
KPI Type	Step by Step KPI Values
Definition	

Fig. 2

Define the textual data values and explanation of each text value in the KPI document.

KPI Data Values			
Numerical Values	Numbers Not Accepted		
Textual Values	Unrestricted Text Not Accepted Specified Text Accepted		
		Specified Text	Explanation
		1 Not Started	Not started
		2 No Plan	No plan defined
		3 Plan	Plan defined
		4 Off Track	In progress, but not on track
		5 On Track	In progress and on track
		6 Complete	Plan completed
		7	
		8	
		9	
		10	

Fig. 3

Enter the appropriate text value for each reporting period in the ADBS application:

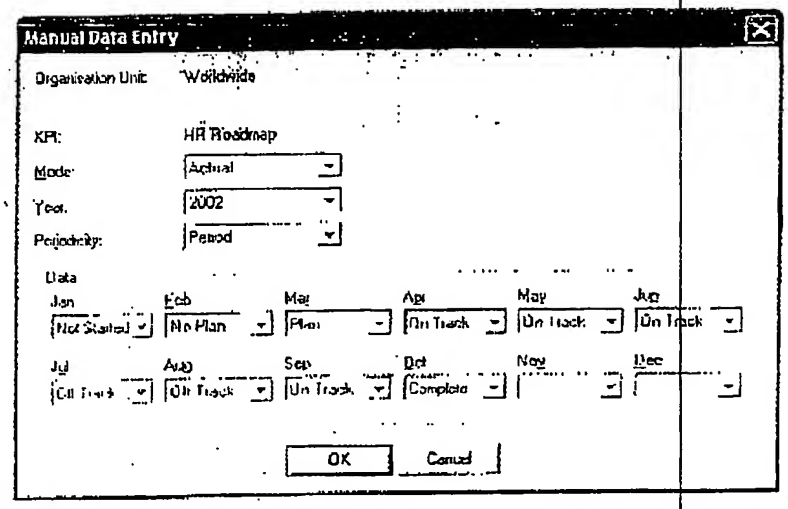
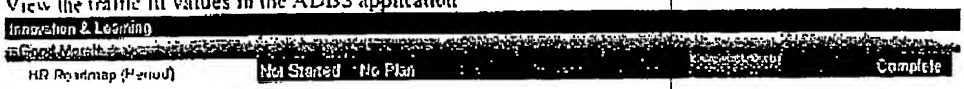


Fig. 4

Fig. 5

View the traffic lit values in the ADBS application:



Full screen:

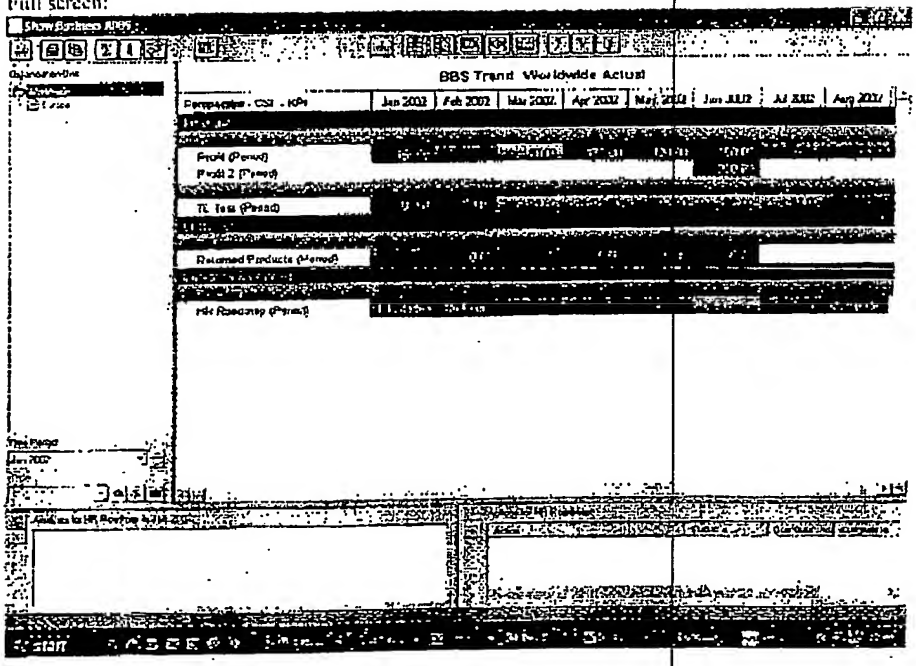


Fig. 6

Fig 7

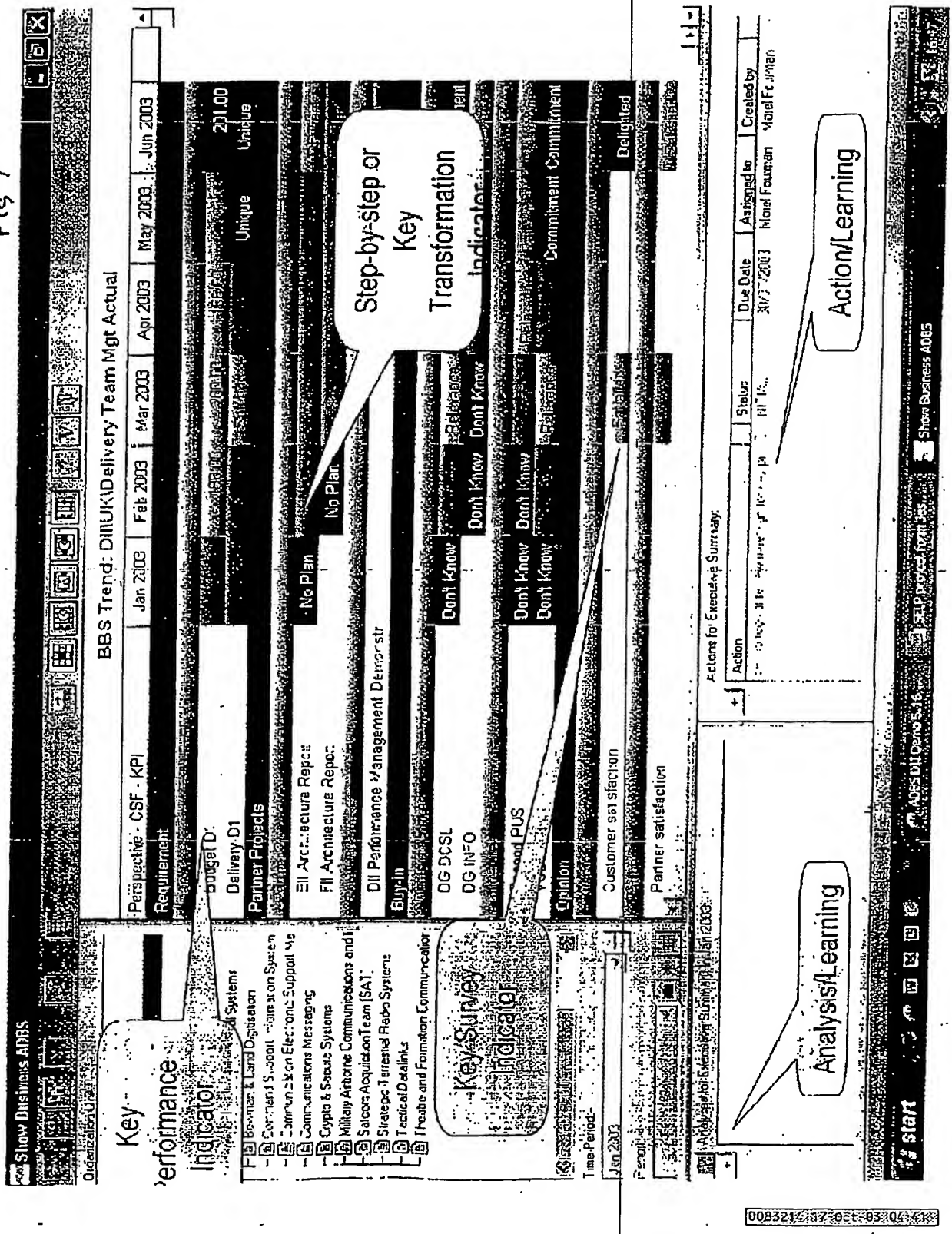
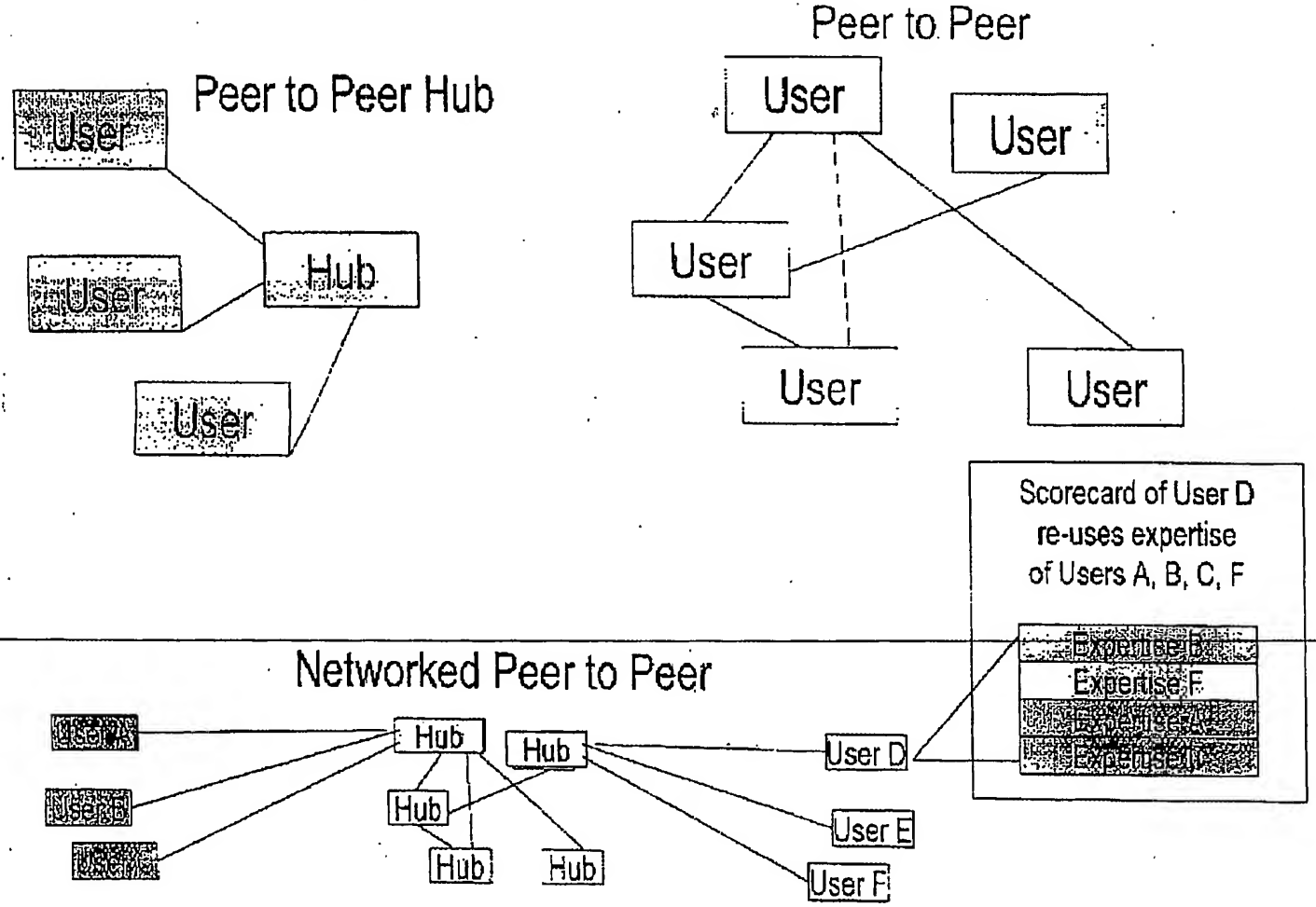

Show Business ADBS
BBS Trend: DIIUKIDelivery Team Mgt Actual
Perspective - CSF - KPI
Jan 2003
Feb 2003
Mar 2003
Apr 2003
May 2003
Jun 2003
Requirement
Budget D
Delivery-D1
Partner Projects
Unique
Key Performance Indicator
Step-by-Step or Key Transformation Indicator
No Plan
Dont Know
DII Performance Management Demonstr
Buy-in
DG DCSL
DG INFO
Key Survey Indicator
Customer satisfaction
Partner satisfaction
Delighted
Actions for Executive Summary:
Action
Status
Due Date
Assigned to
Created by
Analysis/Learning
Action/Learning
Start
Show Business ADBS

Fig 8

Re-using expertise by sharing scorecards



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F59

Short text to be displayed in scorecard
Checklist of criteria and/or description
Underline text indicates link to relevant knowledge nuggets, may be
1. generated by users of system (experience with this step),
2. manually entered,
3. generated by search engine, or other program.
KPI Data Values
Numerical Values
Textual Values
Learning Type: VISUAL
Values: Commitment, Vision, Focus
Role:
Purpose:
Numbers Not Accepted
Unrestricted Text Not Accepted
Specified Text Accepted
Specified Text
1 TBD
2 Benefits
3 Curriculum
4 Issues
5 Tests
Benefits are clearly defined
Enhanced curriculum developed
Enhanced curriculum
Understanding of benefits tes
notes

Fig 10

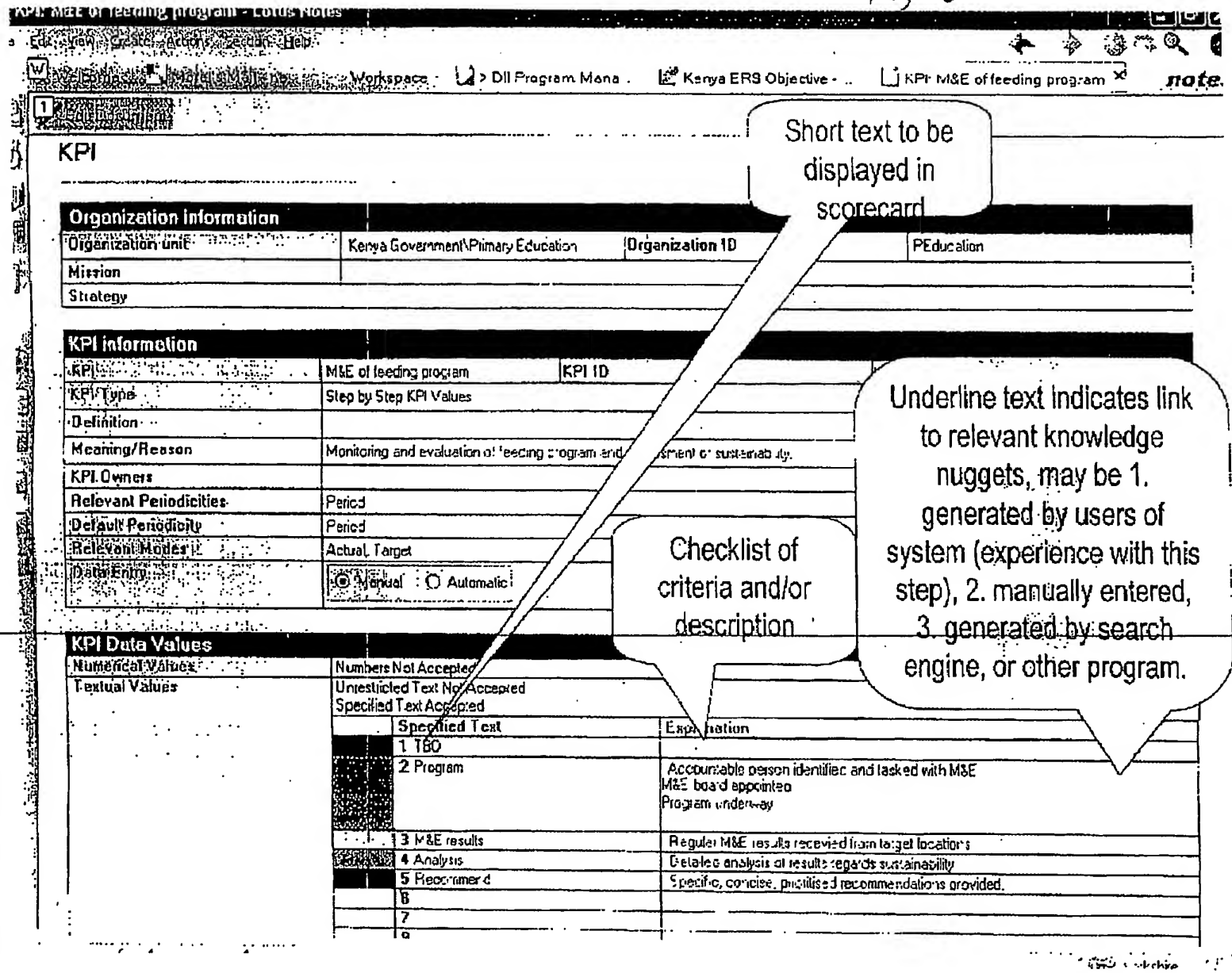

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Fig 11

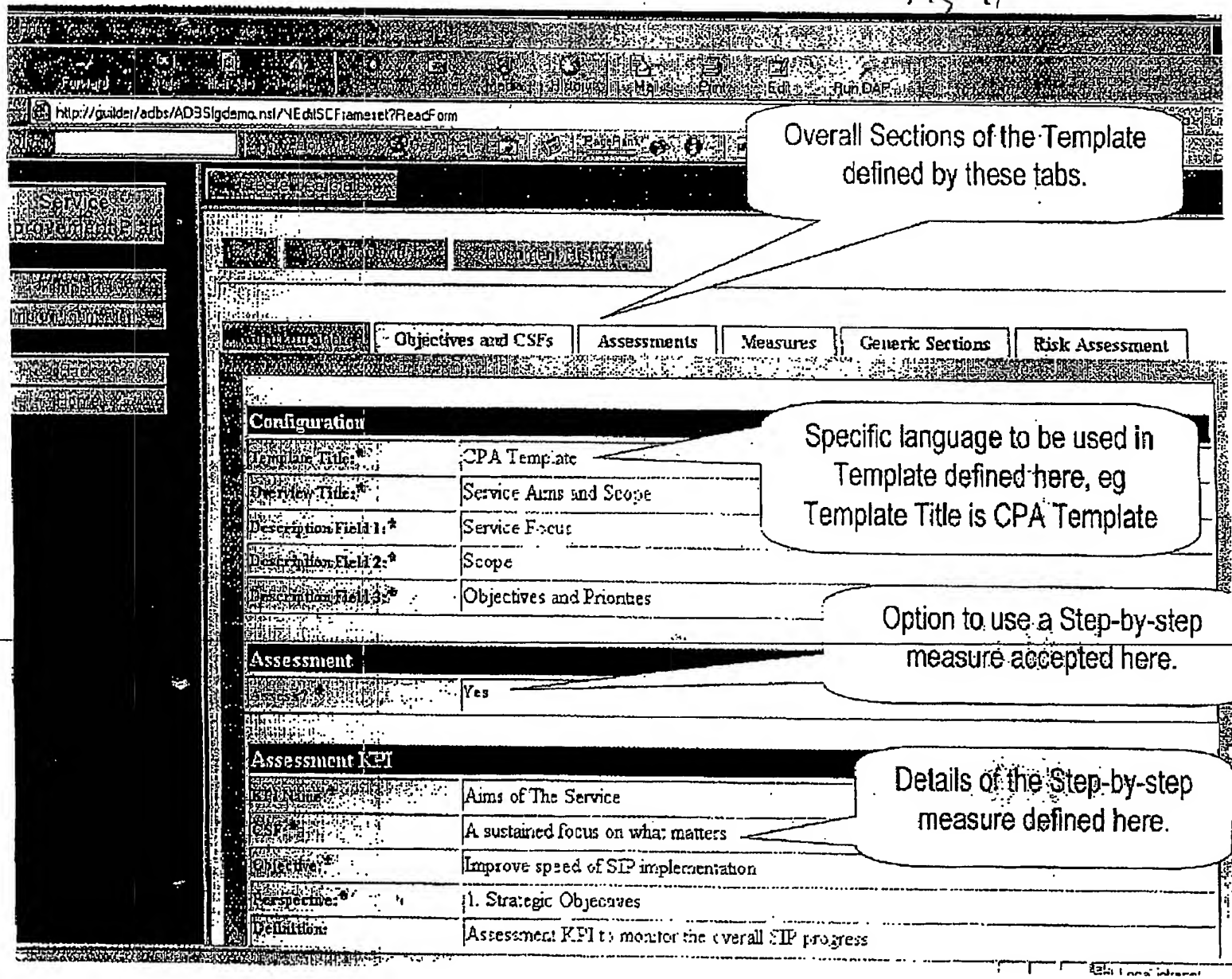

http://guilder/adbs/ADBSIgdemo.nsf/NEditSCFrameset?ReadForm
Overall Sections of the Template defined by these tabs.
Objectives and CSFs
Assessments
Measures
Generic Sections
Risk Assessment
Configuration
Template Title:*
CPA Template
Overview Title:*
Service Aims and Scope
Description Field 1:*
Service Focus
Description Field 2:*
Scope
Description Field 3:*
Objectives and Priorities
Specific language to be used in Template defined here, eg Template Title is CPA Template
Assessment
Yes
Option to use a Step-by-step measure accepted here.
Assessment KPI
Aims of The Service
A sustained focus on what matters
Improve speed of SIP implementation
1. Strategic Objectives
Assessment KPI to monitor the overall SIP progress
Details of the Step-by-step measure defined here.

Fig 12

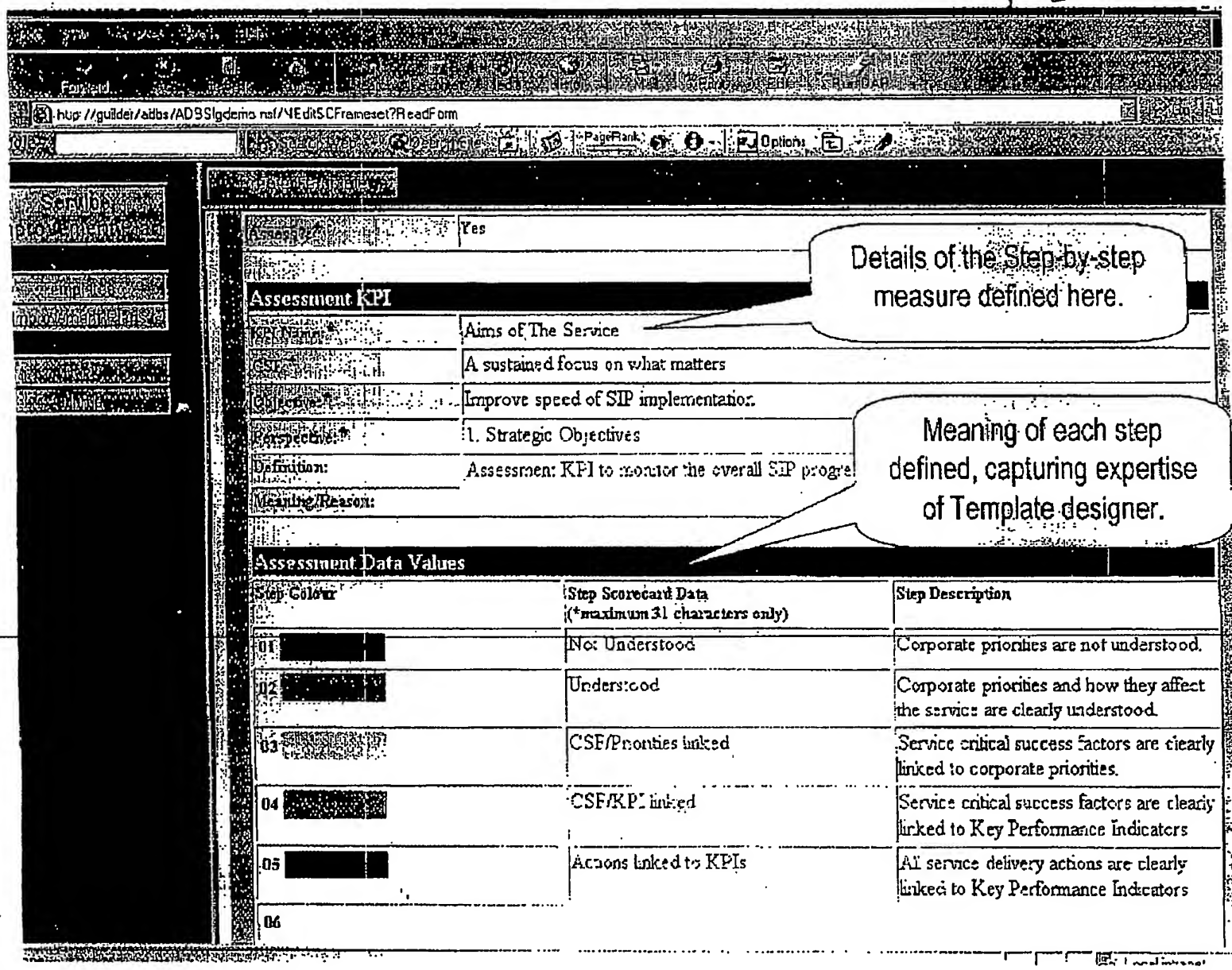

http://guildei/adbs/ADBSIgdemo.nsf/VEditSCFrameset?ReadForm
Assessed: Yes
Assessment KPI
KPI Name: Aims of The Service
CSF: A sustained focus on what matters
Objective: Improve speed of SIP implementation.
Perspective: 1. Strategic Objectives
Definition: Assessment KPI to monitor the overall SIP progre
Meaning/Reason:
Details of the Step-by-step measure defined here.
Meaning of each step defined, capturing expertise of Template designer.
Assessment Data Values
Step Colour
Step Scorecard Data (*maximum 31 characters only)
Step Description
01 Not Understood Corporate priorities are not understood.
02 Understood Corporate priorities and how they affect the service are clearly understood.
03 CSF/Priorities linked Service critical success factors are clearly linked to corporate priorities.
04 CSF/KPI linked Service critical success factors are clearly linked to Key Performance Indicators
05 Actions linked to KPIs All service delivery actions are clearly linked to Key Performance Indicators
06

Fig 3

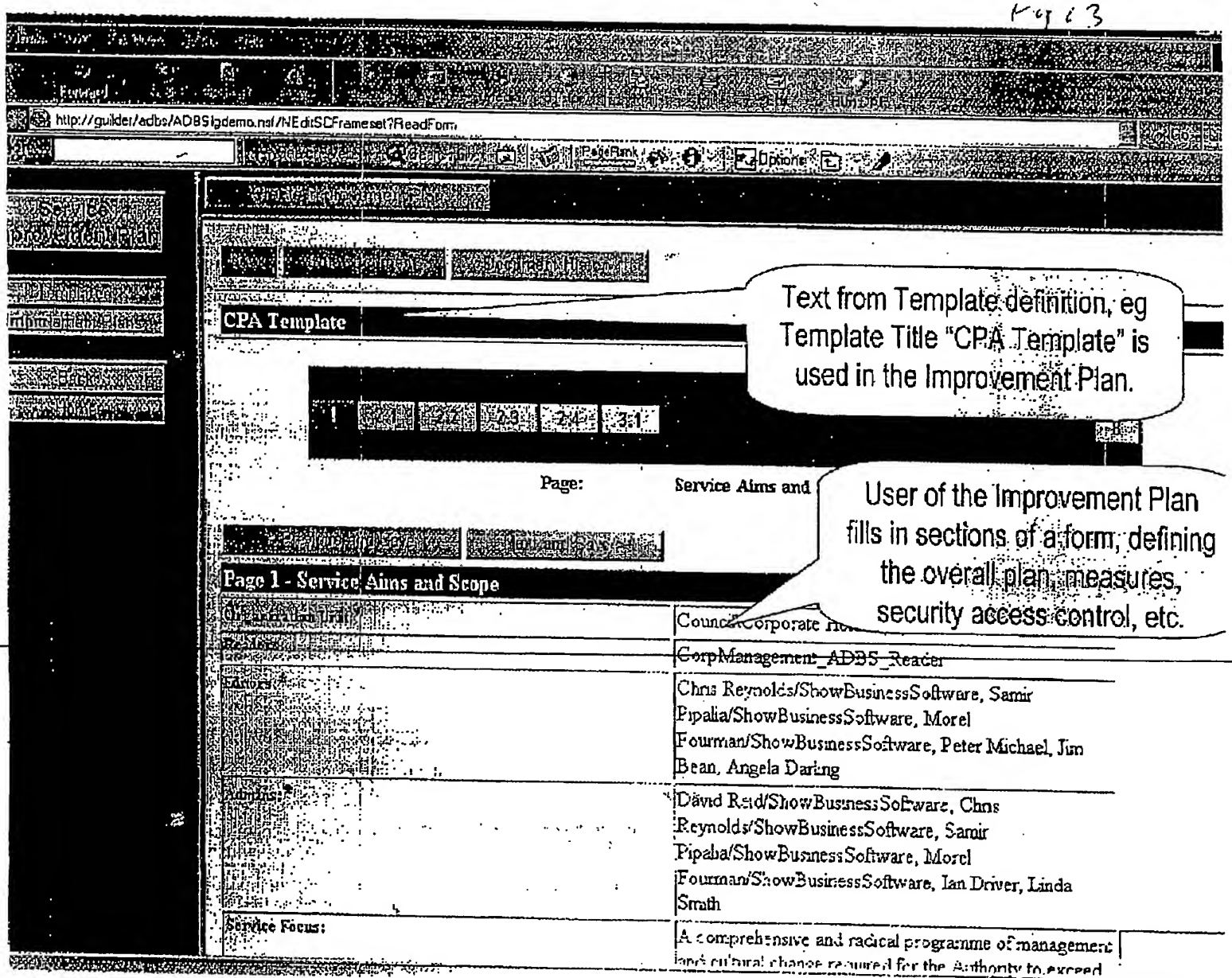

http://guilder/adbs/ADBSIgdemo.nsf/NEditSCFrameset?ReadForm
CPA Template
Text from Template definition, eg Template Title "CPA Template" is used in the Improvement Plan.
Page:
Service Aims and
User of the Improvement Plan fills in sections of a form, defining the overall plan, measures, security access control, etc.
Page 1 - Service Aims and Scope
CorpManagement_ADBS_Reader
Chris Reynolds/ShowBusinessSoftware, Samir Pipalia/ShowBusinessSoftware, Morel Fourman/ShowBusinessSoftware, Peter Michael, Jim Bean, Angela Darling
David Reid/ShowBusinessSoftware, Chris Reynolds/ShowBusinessSoftware, Samir Pipalia/ShowBusinessSoftware, Morel Fourman/ShowBusinessSoftware, Ian Driver, Linda Smith
Service Focus:
A comprehensive and radical programme of management

Fig 14

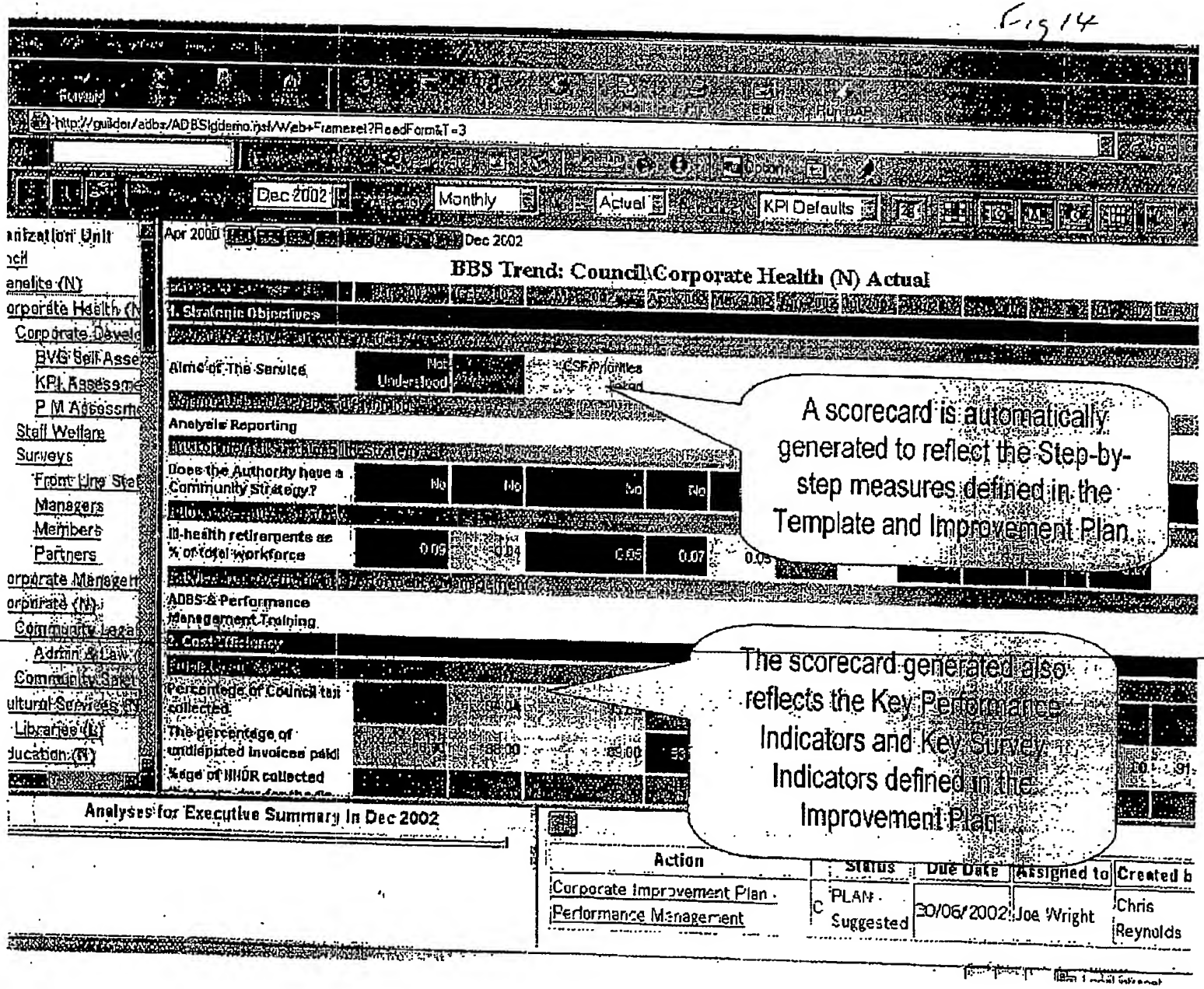
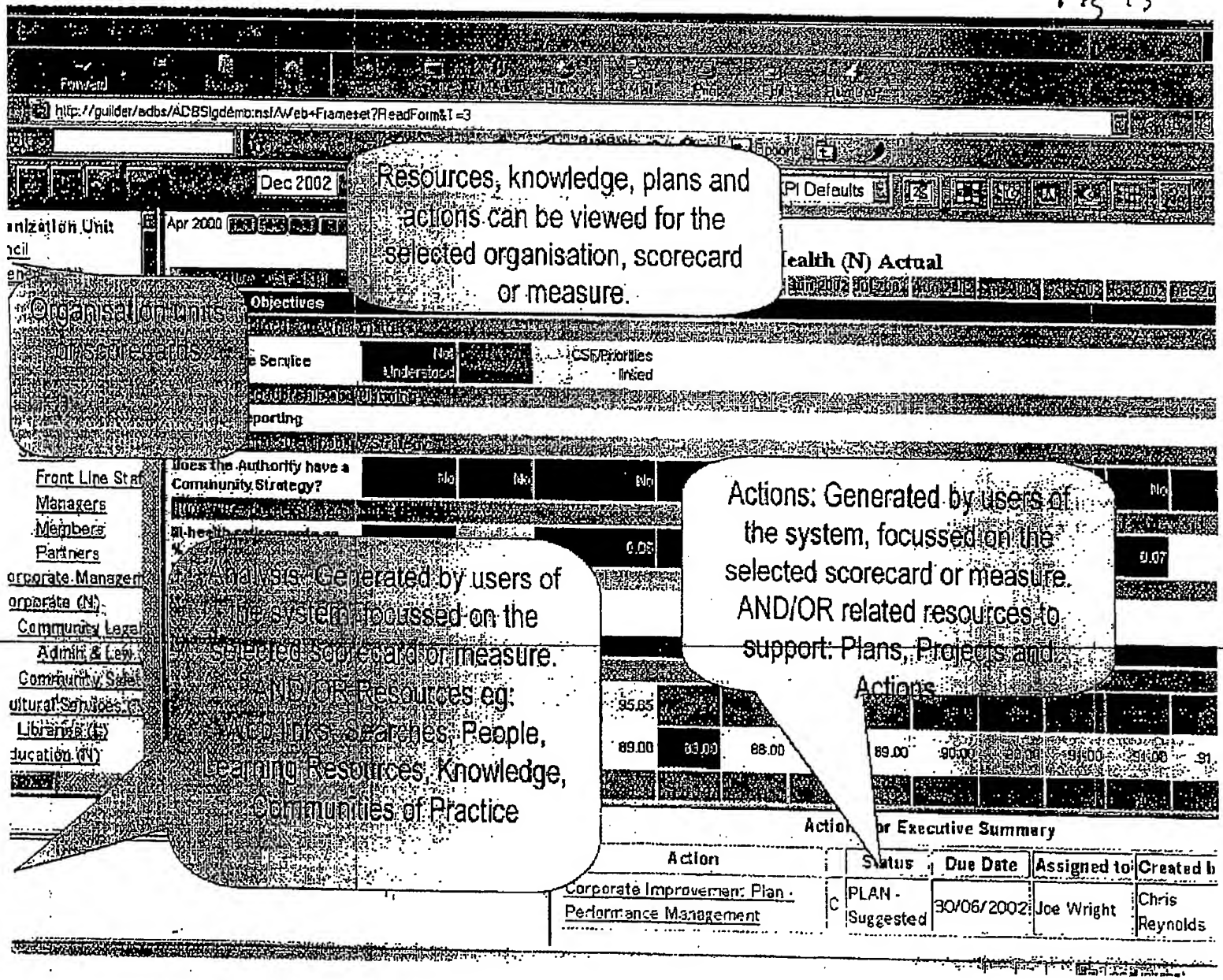

http://guilder/adbs/ADBSIgdemo.nsf/Web+Frameset?ReadForm&T=3
Dec 2002
Monthly
Actual
KPI Defaults
Apr 2000
Dec 2002
BBS Trend: Council\Corporate Health (N) Actual
1. Strategic Objectives
Aims of The Service
CSF Priorities
Analysis Reporting
Does the Authority have a Community Strategy?
No
No
No
No
Ill-health retirements as % of total workforce
0.09
0.04
0.05
0.07
0.05
ADBS & Performance Management Training
2. Cost Efficiency
Percentage of Council tax collected
The percentage of undisputed invoices paid
Wage of NNDR collected
Analyses for Executive Summary In Dec 2002
A scorecard is automatically generated to reflect the Step-by-step measures defined in the Template and Improvement Plan.
The scorecard generated also reflects the Key Performance Indicators and Key Survey Indicators defined in the Improvement Plan.
Action
Status
Due Date
Assigned to
Created b
Corporate Improvement Plan - Performance Management
PLAN - Suggested
30/06/2002
Joe Wright
Chris Reynolds

Fig 15



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